

King County Human Resources Division, through a competitive RFQ process, created a talent pool of consultants with proven track records in Organizational Development, Training, Workplace Investigations, Executive Searches, and Lean Consulting. The County has entered into master contract purchase agreements with these consultants. King County agencies may enter into work orders and use these experts without going through a separate contracting process, saving the county considerable time and money. All costs for external consultants are paid by the requesting department.

The Work Order Process

Work with a consultant from the consultant pool shall not begin until the proper paperwork is completed and signed by HRD, and a Purchase Order is issued by Procurement & Contract Services.

Step 1: Solicitation

To meet the county's procurement requirements, any work order expected to be more than \$5,000 but less than \$25,000 must be solicited from at least 3 consultants in the pool. If the work order is expected to be more than \$25,000, the agency must solicit *all* consultants on the list. Please do not use a single consultant repeatedly; although past work at the agency may be criteria for evaluating the consultant's bid to perform future work, there must be still be a competitive process. *If it is necessary to use the same consultant, the agency must go through the Waiver process for permission to use the consultant before any work begins. If the Procurement Waiver is approved, the agency must attach the approved Waiver to the request to HRD.*

To solicit from the consultant list, you may email consultants with a summary of the project and request that consultants interested in the work respond within a reasonable time with information to help you evaluate their proposal. This information may include: price, availability and ability to meet the deadline, and the consultant's work history performing similar investigations. Solicitations may be done by fax or email. All bids and rating materials – paper and electronic - shall be retained by the agency for a period of three (3) years.

Step 2: Consultant Selection Information Form

Once you have selected a consultant, please fill out and sign the attached Consultant Selection Information Form and send it to the consultant for signature. The Consultant Selection Information Form may be faxed or scanned, and originals are not required. Send the completed Consultant Selection Information form to HRD (Greg.Felton@kingcounty.gov). Attach additional pages, including the solicitation and bid documents, if necessary. HRD will review and approve the use of the consultant, and will notify Procurement & Contract services. HRD will next return a copy of the approved form to the agency contact and the consultant, with additional instructions for the agency. The form will include a **Contract Purchase Agreement** number, and a PCS service request number.

Step 3: Requisition & Purchase Order

Even though the agency is approved to begin work with the consultant, agencies should use the following procedures for creating a requisition and generating a Purchase Order. This step enables the agency to encumber funding for the project and allows for direct payment of invoices. The purchase order will also notify the consultant that work may begin.

An online Requisition must be created by the agency in Oracle EBS. The requisition should include:

- Choose a “Non Catalog Request.”
- Item Type is “Services Billed by Quantity”
- Item description – please include the consultant name *and the PCS service request number from the approved Consultant Selection Information form*. This notifies the Buyer that the work has been approved by HRD.
- Suggested NIGP Code is **918.00 “Consulting Services”**
 - Enter the entire amount approved on the Consultant Selection Information Form. (Quantity = the dollar amount without the \$ sign, Unit of Measure = “Dollars”, and Rate per Unit = “1.”) Do not enter multiple requisitions and create multiple purchase orders for the same project; you are able to receipt multiple invoices off the same purchase order.
 - You may reference the CPA number in the Contract Number field, or search in Supplier Name for the consultant.
 - Buyer – Betts, Catherine

Once approved by your agency Oracle Approver, the Procurement and Contract Services Section (PCS) Buyer will create a Purchase Order and transmit this Purchase Order to the agency and to the consultant.

Step 4: Receipting

The Purchase Order sent to the consultant will include instructions that invoices should be sent to central Accounts Payable at

**Accounts Payable, 3rd Floor
401 5th Avenue, CNK-ES-0320
Seattle, WA 98104**

Consultants may send a copy of the invoice to the agency, at their option.

Oracle requisitioners and receivers will be notified in Oracle when an invoice is received at Accounts Payable, and will be asked to authorize payment.

Other Information:

If completed work order is less than original amount requested, notify the Buyer to reduce the amount on the Oracle purchase order to close out the Purchase Order.

HRD does not need copies of the invoices, or the consultant work product. Agencies should retain copies of the solicitations, responses and selection materials for 3 years in case of audit or a public records request.

In some cases, the agency may request follow-up work beyond the original scope of the work. If additional time and compensation is needed, the work order may be amended quickly with a single-page work order amendment. Please contact HRD for a copy of this form, which must again be signed by the project manager, consultant, and HRD. HRD will transmit the signed contract amendment form to Procurement. Please remember, agencies will need to submit another electronic requisition to Procurement to increase the existing Purchase Order for the amount approved on amendment for the

Work Request. In the description line, please indicate the existing Purchase Order number that will have funds added.

The King County Prosecuting Attorney's Office (PAO) is not required to use a competitive process to procure legal services in defense of the County, and does not need to use the consultant pool or follow the consultant selection process. However, if an agency other than the PAO is paying for a workplace investigator from the pool, that agency will need to work with HRD to get a work order number, and solicit from the consultant pool. *Please do not rely on the PAO to procure a consultant.*

If there are any questions or problems, or if you have any feedback to share about your experience with a consultant, please contact HRD.



King County

CONSULTANT SELECTION INFORMATION FORM

Human Resources Division

Mail Stop ADM-ES-0450 Email Greg.Felton@kingcounty.gov

VOICE (206) 205-1594, FAX (206) 296-3904

Please complete all asterisked (*) information below and return to Human Resources. Please allow sufficient time for all required signatures and 24-hour processing of documents. **Consultant work can only begin upon approval by HRD and issuance of a Purchase Order by Procurement & Contract Services.**

*Department: _____ *Division: _____

*Project Manager: _____ *Phone Number: _____

*Fax Number: _____ *Email: _____

*Consultant Selected: _____

*Project Title: _____

*Start Date: _____ *End Date: _____

*Total project amount \$ _____

*Which consultants were considered for this work order? *Agency must include 3 consultants from the category for projects under \$25,000 and include all consultants from the category for projects over \$25,000.*

*Why was this consultant selected? *This is a summary justification; agency is required to retain scoring materials for a period of three (3) years.* _____

* Work Order Category:

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Organizational Development

Category A - Change Management

Category B - Conflict Resolution & Team Building

Category C - Organizational Performance Management

Category D - Facilitation Services

Category E - Performance Coaching

Category F - Customer/Employee Surveys

Project Manager Signature Date

Consultant Signature Date

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Workplace Investigation

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Executive Search

☐

Lean Consulting

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Training

HRD Signature Date

PCS Service Request Number: _____.

Master Contract Purchase Agreement Number: _____